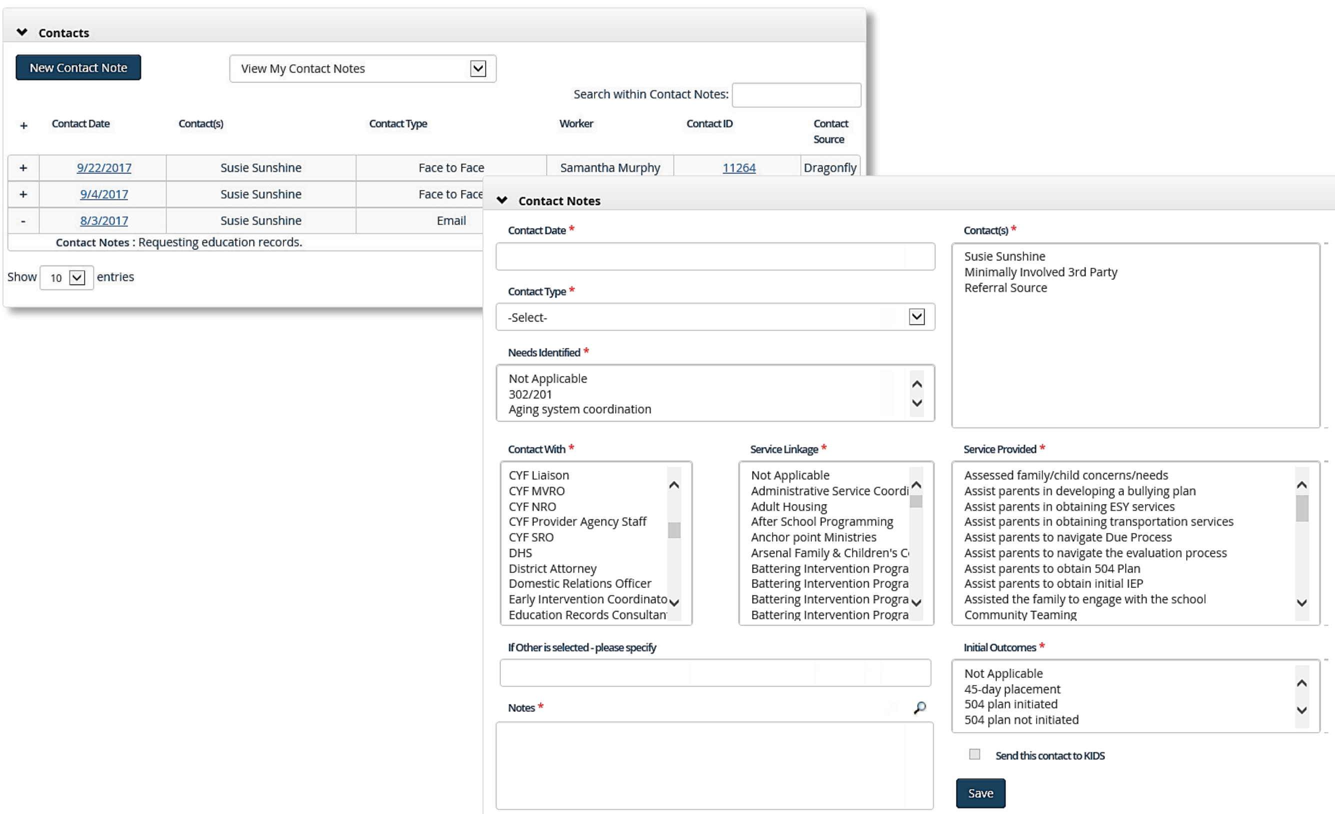
# Contacts – Dragonfly Job Aid

The *Contacts* screen allows users to document their communications regarding the Client. Client who are active in Synergy in YSP (Client Support Partners) and/or IL (Independent Living) may also have Contacts from these systems listed in the *Contact Notes* grid. IL Contact Notes will also appear in YSP and Dragonfly if the Client is active in either system. If the Client is active with CYF the Contact Notes can be sent to the KIDS system and appear on the **Contacts** page in KIDS.

## Contacts



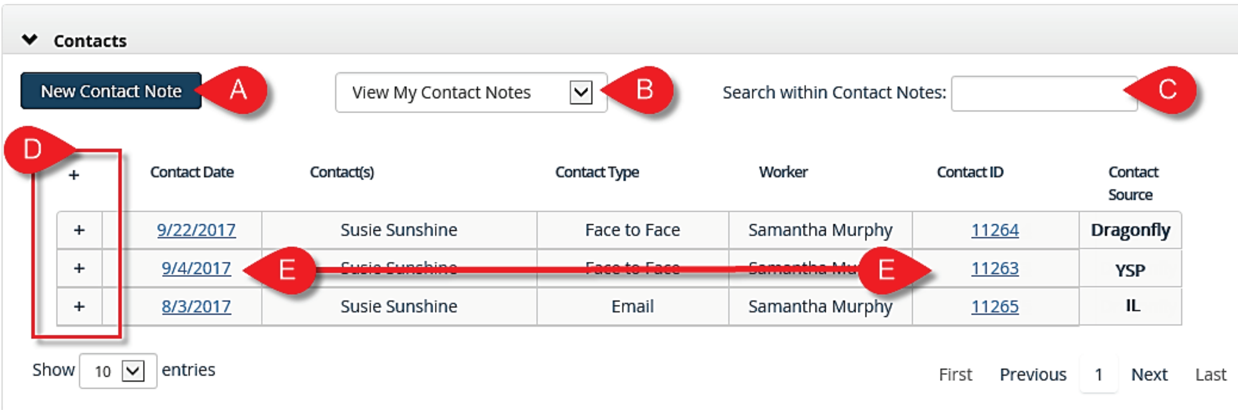

## Navigation

1. From the Dashboard: Locate the desired Referral and click on the *Referral ID* to bring the Referral into focus.
   a. Click on the **Contacts** tile.

2. The **Previous** and **Next** buttons can be used to navigate up or down one screen within the Left Navigation tiles.

## Contacts list pane

1. Contacts pane:

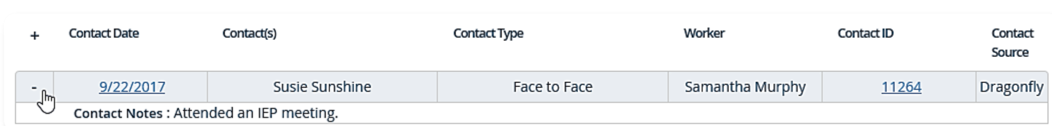



a. To start documenting a new Contact, click **New Contact Note**.

b. The Contacts grid contains Contacts for the Client from Dragonfly, IL, and/or YSP (If the Client is active in IL and/or YSP). The grid is automatically filtered to view only Dragonfly Contacts ("View My Contact Notes"). To view all Contacts, select "View All Contacts" from the drop-down.

c. Users can search for a specific Contact or set of Contacts by using the *Search within Contact Notes* field.
Note: The search will only bring up information in the grid columns. The *Contact Notes* within the Contacts cannot be searched from this field.

d. To view the *Contact Notes* from the grid without opening the Contact click on the **[ + ]** to the left of the Contact in the grid. To close the *Contact Notes* view, click on the **[ - ]** that now appears to the left of that Contact in the grid.

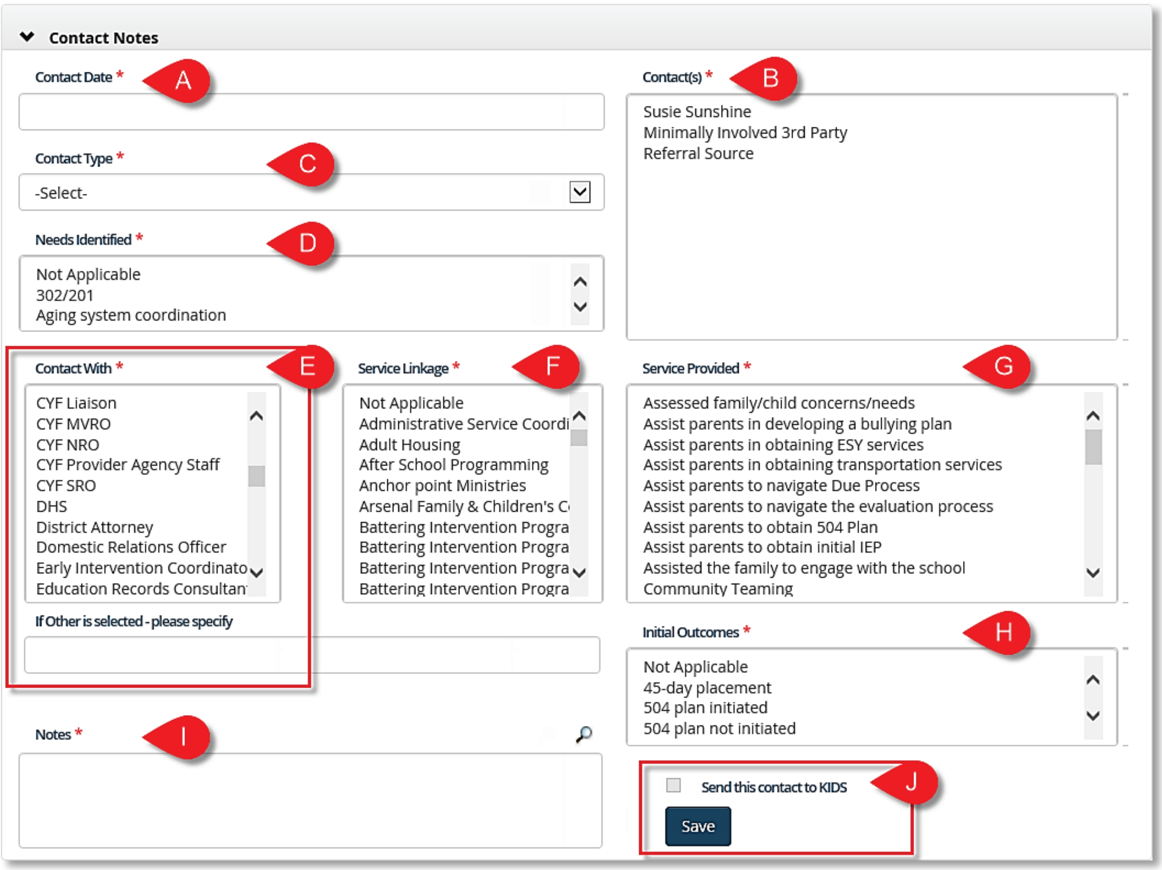



i. To view the *Contact Notes* for all of the Contacts in the current page of the grid click on the **[ + ]** above the grid. To collapse all of the *Contact Notes* click on the **[ - ]** that now appears above the grid.

e. To view or update an existing Contact, click on the *Contact Date* or *Contact ID* of the desired Contact in the *Contacts* grid.

# Contact Notes

1. Contact Notes :




a. *Contact Date*: Enter the date that the Contact occurred. This cannot be future dated.

b. Contact(s): Select all individuals who participated in the Contact from the multi-select box.

c. *Contact Type*: Select the type of Contact from the drop-down.

> ***TIPS FOR MULTI-SELECT BOXES:*** *Click to select the items that apply. To select more than one item, hold down the* ***[Ctrl]*** *key on the keyboard while clicking on each applicable reason. Selected items will be highlighted in blue. To de-select an item hold down the* ***[Ctrl]*** *key and click on the item again. The de-selected item will no longer be highlighted.*

d. *Needs Identified*: Select all applicable needs from the multi-select box.

e. *Contact With*: Select all of the types of individuals who were contacted from the multi-select box.
If "Other" is selected in the *Contact With* multi-select box, specify the type of individual in the *If Other is selected – please specify* field.

f. *Service Linkage*: Select all services that were linked during this Contact from the multi-select box.

g. *Service Provided*: Select all services that were provided during this Contact from the multi-select box.

h. *Initial Outcomes*: Select all applicable initial outcomes from the multi-select box.

i. *Notes*: Enter notes regarding the Contact in the narrative text box.

j. If the client is active in the KIDS system, this Contact can be sent to the Client's case within the KIDS system when the ☑ *Send this contact to KIDS* checkbox is checked.
Once everything has been completed, click **Save** to complete the Contact.

## *For more information…*

For assistance, please contact the Allegheny County Service Desk at ServiceDesk@AlleghenyCounty.US or call 412-350-HELP (4357). Select Option 2 for the DHS Service Desk.

To access iService, go to: https://servicedesk.alleghenycounty.us

This and other Job Aids can be found at: http://s3.amazonaws.com/dhs-application-support/index.htm